



Investment Adviser Representative

Gregory G. Randall
Beacon Financial Partners
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Principal Office:
25825 Science Park Drive,
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This brochure supplement provides information about Gregory G. Randall, an investment adviser representative herein referred to as "Your Adviser" that supplements the Beacon Financial Advisory LLC Form ADV 2A, which you should have already received.

Please contact Beacon Financial Advisory LLC at 216-910-1850, if you did not receive the Investment Advisory Disclosure Brochures for the above listed registered investment advisers or if you have any questions about the contents.

Additional information about Gregory G. Randall, is available via the U.S. Securities and Exchange Commission's website at www.adviserinfo.sec.gov.

Item 2 – EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE

Gregory G. Randall

Year of Birth: 1963

Education

University of Michigan, B.S., Industrial Engineering, 1987

Business Experience

Gregory G. Randall is dually registered as an investment Adviser Representative and Registered Representative of a Broker-Dealer and one or more Registered Investment Advisers.

- Investment Adviser Representative, Beacon Financial Advisory LLC, 2015-Present
- Investment Adviser Representative, Lincoln Investment Planning, LLC, October 2024- Present
- Investment Adviser Representative, Capital Analysts, LLC, June 2012 – Present
- Registered Representative, Lincoln Investment, June 2012 – Present
Financial Adviser, Capital Analysts, Incorporated, 2010 – June 2012
- Registered Rep, Sanders Morris Harris Inc., 2006 – 2010

Professional Licenses/Designations

Gregory G. Randall, holds the following industry exams or equivalency and Professional Designations.

Series 6 - Investment Company and Variable Contracts Products Representative Examination

Series 7 - General Securities Representative Examination

Series 24 - General Securities Principal Examination

Series 63 - Uniform Securities Agent State Law Examination

DISCIPLINARY INFORMATION

Gregory G. Randall has no material legal or disciplinary events to report.

OTHER BUSINESS ACTIVITIES

Registered Representative - Gregory G. Randall is a registered representative of Lincoln Investment, a registered broker-dealer. Your adviser may offer the broker-dealer services of Lincoln Investment in addition to advisory services when making financial recommendations to you. If you purchase commissionable products through your adviser, your adviser will receive a commission, and in the case of mutual funds, possibly a 12b-1 fee. You are under no obligation to purchase commissionable securities products through Gregory G. Randall. All individuals that act as either broker dealer agents and/or investment advisor representatives are also licensed to offer insurance products to our clients. This may include traditional life insurance, annuities (fixed and equity indexed) and other insurance products that a client may have a need for. In this role, they will earn a commission on the sale of these products. This represents a potential conflict of interest which needs to be disclosed to our clients.

Investment Adviser Representative-Gregory G. Randall is an investment Adviser representative with Capital Analyst, LLC and Lincoln Investment Planning, LLC.

Capital Analysts and Lincoln Investment provide incentives, such as sales conferences, for financial

advisers, the eligibility for which may be based on the number of advisory accounts or the total assets under management. This may present a potential conflict of interest. Capital Analysts and Lincoln Investment hold their Financial Advisers to a Code of Ethics and owe a fiduciary duty to all clients. Both firms require your Financial Adviser to place your interests above his or her own at all times and to avoid any recommendation that would not be in your best interest. It is each financial adviser's responsibility to understand and adhere to the requirements of the Code of Ethics, as well as applicable laws, regulations, and rules.

Independent Insurance Agent-Gregory G. Randall is licensed through Lincoln Investment or an independent agency to solicit, offer and sell insurance products. Your adviser may be appointed with various insurance companies. Gregory G. Randall may receive separate, yet customary commission and other financial incentive compensation resulting from the purchases and sales of insurance products. You are under no obligation to purchase insurance products through Gregory G. Randall.

Beacon Financial Partners – Gregory Randall is the sole owner of Beacon Financial Partners, LLC (“BFP”). BFP serves as an Office of Supervisory Jurisdiction for Lincoln Investment and may also offer financial planning services to Beacon FA's advisory clients. Mr. Randall is a W2 employee and serves as the President of this organization. Clients should be aware that these services pay a commission or other compensation and involve a conflict of interest. Beacon FA always acts in the best interest of the client. Clients are in no way required to utilize the services of any representative of Beacon FA in such individual's outside capacities.

No client is under any obligation to purchase any non-investment related activities from this adviser. The above firms are independent and non-affiliated with the RIA.

Power of Joy – Gregory Randall serves as a board member and President of this non-profit.

Item 5 – ADDITIONAL COMPENSATION

Your adviser's involvement in other business activities as described above defines additional activities for which your adviser could recommend other products or services to you. This creates a potential conflict of interest for your adviser to promote these products or services in addition to the advisory services.

The registered investment adviser holds your adviser to a Code of Ethics and a fiduciary duty to advisory clients. The registered investment adviser requires your adviser to place your interests above their own at all times and to avoid any recommendation that would not be in your best interest. It is each adviser's responsibility to understand and adhere to the requirements of the Code of Ethics, as well as applicable laws, regulations, and rules.

Perceived or actual conflicts of interest that may arise in relation to advisory services are governed by your adviser's professional and legal duties as a fiduciary, and by the registered investment adviser's policies and procedures designed to mitigate and disclose the existence of such conflicts.

Please refer to the Fees and Compensation section in the registered investment adviser's Investment Advisory Disclosure Brochure (Form ADV 2A) which should have been provided to you by your Financial Adviser. The Fees and Compensation section describes in detail the potential other forms of compensation received by your adviser such as brokerage or insurance commissions, due diligence seminars, sales incentives, loans, or advances.

Item 6 – SUPERVISION

Your adviser is assigned to a Designated Supervisor that is responsible for supervising your adviser's investment advisory activities.

Supervisor Name:

Deborah L. George

Chief Compliance Officer

Phone Number: 216-910-1850

The Designated Supervisor or his or her designee will periodically review the investment advisory activities, client communications, and your adviser's adherence to the registered investment adviser's Code of Ethics. In addition, the Designated Supervisor will monitor the advice being provided to ensure that your adviser is providing the services for which the adviser was engaged.